



Global Packaging Refresh Quantitative Study



Consumer Insights
April 2018

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BELKIN_000159



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Background & Objectives

The Belkin Marketing team seeks to streamline and further elevate Belkin's packaging designs with a clearly defined logic and step-up strategy. This research was designed to meet the following objectives:

Research Objectives

- Understand how consumers differentiate between and shop for packages in store
- Understand the hierarchy of packaging elements and placement preferences for those elements
- Inform Belkin's packaging design moving forward to ensure cohesion across all product categories on a global level



Methodology

An online survey was conducted among N=2,800 smartphone owners in the US, the UK, France, Germany, Australia, Japan, and Korea in April 2018. Respondents were sourced through a nationally representative panel and those who completed the survey in its entirety received an incentive for their participation. The survey was kept blind so respondents did not know Belkin funded the research study.

Target Audience

- Decision maker of tech purchases
- 18 – 55 years old
- 50/50 gender split
- Smartphone owner

Total	N=2,800
US	400
UK	400
France	400
Germany	400
Australia	400
Japan	400
Korea	400



Executive Summary

Package Element Preferences

Aside from the value of the product, consumers find compatibility information and technical specifications to be the most important elements on a smartphone accessory product package. Brand reputation is also highly important as this implies quality and durability. Consumers slightly prefer that compatibility information is communicated through a list of device models.

Mobile Power Category Preferences

Across all mobile power categories, consumers expect to see the product on the front of the package, either through a window or a photo, and want to see detailed product descriptions and explanations of how the product works on the back of the package. On the front of the package they prefer plastic windows to photos as being able to see the product helps them perceive its quality and help to assure them they are buying the correct product.

Consumers prefer that charging speed on wireless charging pad packages be communicated through hours/minutes. On power bank packages, consumers want to see data on charging speed – namely, how quickly it will charge their device and how long the power bank itself will take to recharge.

Shopping Behaviors and Preferences

Globally, the majority of consumers research products before going to a store to shop, primarily comparing products online, and 6 in 10 consumers spend time browsing the shelf when in store. While 4 in 10 always look at the sides/back of product packages before making a purchase, an equal number only interact with eye-catching packages or those that they want to compare.

When comparing packages of interest, clear technical specifications, brand, and price are the most influential drivers of decision-making. In determining which product is more premium, consumers look for high quality product photos and a window so that they can see the actual product.

Brand Awareness and Perceptions

Apple and Samsung lead globally in both unaided and aided brand awareness. While Belkin's unaided awareness is low and on par with Nokia, it leads competitors like Amazon Basics in aided awareness.

Belkin's smartphone accessory brand block is seen as useful, basic and ordinary. There is room for improvement on perceptions of quality, reliability, and premiumness.



Recommendations

- 1 Design packages in a **clean** and **simple** format to clearly showcase the elements that are important to consumers: compatibility and technical specifications

- 2 Highlight **compatibility** information via a list of device models on the front of the package to reassure consumers a product will work with their device

- 3 Communicate **charging speed** through hours/minutes on wireless charging pad packages and highlight data on increased charging speed (e.g., “40% faster) on power bank packages

- 4 Add a **window** to product packages to help increase trust in the product and perceptions of quality

- 5 Increase marketing efforts (beyond packaging) to improve perceptions of **quality, reliability, and premium**



Packaging Overview

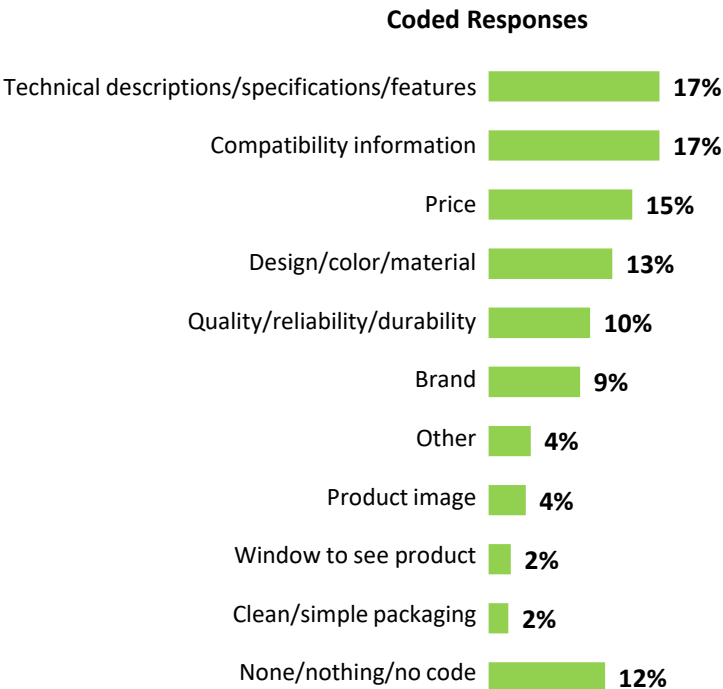




First Glance Package Elements – Open-Ended Feedback

When shopping in store for a smartphone accessory, consumers look first for technical specifications and compatibility information, followed by price and design.

Base: Total US Respondents (n=400)



Q. When shopping for an smartphone accessory in a physical store, what is the **first thing** you look for on the product package? Why?

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Importance of Package Elements – High Importance

Global consumers find value and information on device compatibility and connector types to be the most important elements on a smartphone accessory package.

Base: Total Respondents
Extremely/Very Important

	Total (n=2,800)	 USA (n=400)	 UK (n=400)	 France (n=400)	 Germany (n=400)	 Australia (n=400)	 Japan (n=400)	 Korea (n=400)
Is a good value for the money	 83%	85%	80%	79%	86%	84%	83%	82%
Tells me what device(s) it is compatible with	 82%	86%	83%	82%	75%	90%	81%	74%
Tells me what connector types it uses	 73%	79%	72%	73%	71%	77%	74%	66%
Has text descriptions to tell me how the product works	 69%	70%	64%	76%	70%	70%	66%	67%
Has a plastic window so I can see the product	 65%	70%	63%	73%	59%	70%	62%	61%
Has a photo of the actual product	 62%	65%	61%	65%	55%	64%	60%	67%
Tells me the product comes with a warranty	 62%	59%	57%	59%	70%	66%	59%	64%
Has images to show more detail about the product	 59%	64%	59%	64%	50%	57%	56%	66%
Has photos/illustrations to show me how the product works	 59%	64%	57%	62%	53%	63%	59%	59%
Has icons to illustrate key product features	 56%	57%	55%	63%	56%	55%	52%	52%

Q. When looking at a smartphone accessory package at a physical store, how important or unimportant are each of the following to you?

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Most Important Package Elements

Aside from value, global consumers find device compatibility and brand reputation to be the most important elements of a smartphone accessory package.

Base: Rated 2+ Elements Extremely/Very Important

	Total (n=2,651)	USA (n=384)	UK (n=380)	France (n=370)	Germany (n=382)	Australia (n=384)	Japan (n=373)	Korea (n=378)
Is a good value for the money	40%	33%	36%	40%	54%	39%	33%	46%
Tells me what device(s) it is compatible with	15%	19%	18%	17%	9%	19%	20%	6%
Is made by a reputable brand	12%	18%	19%	3%	8%	17%	12%	9%
Has a plastic window so I can see the product	4%	4%	4%	7%	3%	5%	3%	3%
Has an appealing packaging design	4%	3%	2%	3%	2%	3%	4%	10%
Tells me the product comes with a warranty	4%	3%	4%	4%	4%	3%	3%	4%
Has an opening so I can touch the physical product	3%	2%	3%	2%	3%	1%	3%	4%
Tells me what connector types it uses	2%	2%	1%	3%	4%	2%	3%	1%
Has a photo of the actual product	2%	1%	2%	2%	2%	2%	2%	3%
Has an extra panel I can open containing more detailed information/images	2%	3%	1%	3%	2%	1%	2%	2%
Has data to support product features	2%	2%	1%	1%	1%	1%	6%	1%
Has icons to illustrate key product features	2%	2%	1%	2%	2%	1%	2%	1%
Has images to show more detail about the product	2%	0%	2%	2%	1%	1%	3%	3%

Note: Only elements with a global percentage of 1% or more are shown.

*Q. You said the following are important to you when looking at a smartphone accessory package in a physical store. Which is the **most important** to you?*

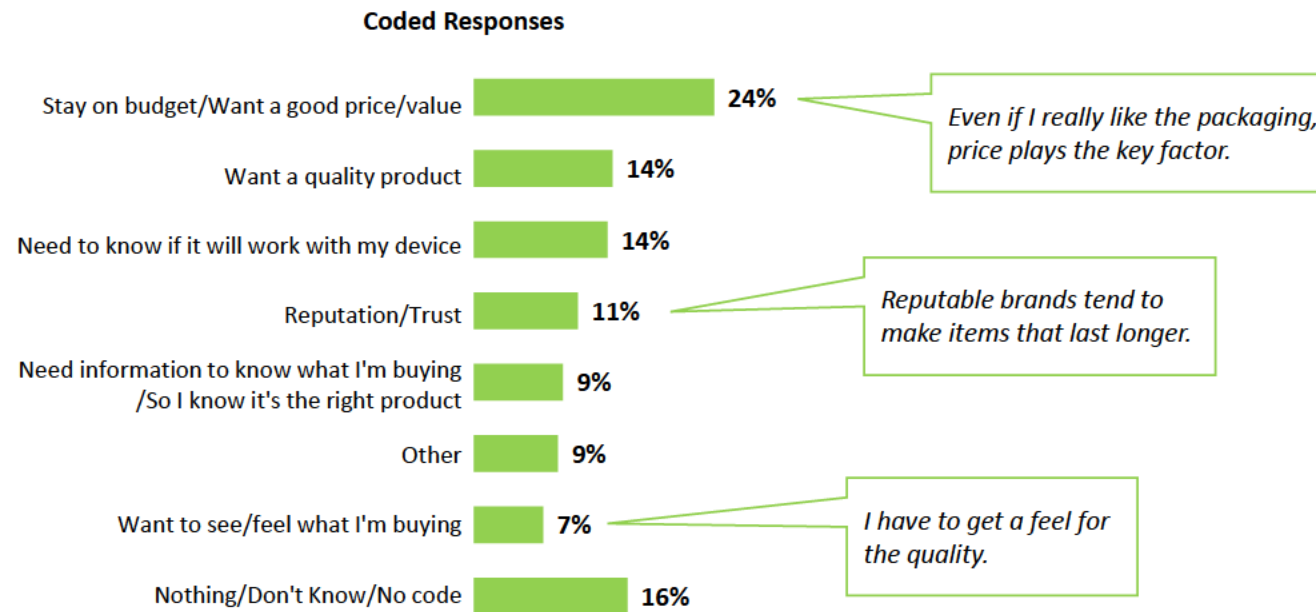
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Most Important Package Elements – Open-Ended Reasons for Selection

Along with the desire to get a perceived good value out of their purchase, consumers want a quality product that they are absolutely sure will work with their device.

Base: Total US Respondents (n=400)



Q. You said this element is most important to you when looking at a smartphone accessory package in a physical store. Why?











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Device Compatibility Preferences

About 4 in 10 global consumers prefer that compatibility be listed by specific device model, followed by device type. Compatibility listed by connector type is least preferred.

Base: Total Respondents

		 USA (n=400)	 UK (n=400)	 France (n=400)	 Germany (n=400)	 Australia (n=400)	 Japan (n=400)	 Korea (n=400)
Device model (e.g., iPhone 8, Galaxy S8, Pixel 2, etc.)	 42%	45%	42%	40%	38%	46%	38%	46%
Device type (e.g., Apple, Samsung, Google, etc.)	 35%	35%	33%	41%	36%	31%	31%	39%
Connector type (e.g., lightning, micro-USB, USB-C, etc.)	 23%	20%	25%	19%	27%	24%	31%	15%

Q. Now, thinking about device compatibility, which of the following gives you confirmation that a product will work with your device?










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Device Compatibility Preferences, Cont.

Among both those who prefer compatibility be shown through device type and those who prefer connector type, over half of consumers would also need to see a list of specific models. This preference is stronger in both groups in Australia, and stronger only among those who prefer device type in France.

Base: Prefers Compatibility Listed by Device Type

		 USA (n=140)	 UK (n=133)	 France (n=165)	 Germany (n=143)	 Australia (n=122)	 Japan (n=124)	 Korea (n=155)
I also need to see a list of models that includes my device	 56%	48%	56%	66%	55%	65%	48%	55%
Device type alone is enough	 44%	52%	44%	34%	45%	35%	52%	45%

Base: Prefers Compatibility Listed by Connector Type

Compatibility Listed by Connector Type		(n=641)	(n=79)	(n=100)	(n=76)	(n=106)	(n=95)	(n=124)	(n=61)
I also need to see a list of models that includes my device	<div><div></div></div> 52%	41%	52%	46%	50%	65%	55%	54%	
Connector type alone is enough	<div><div></div></div> 48%	59%	48%	54%	50%	35%	45%	46%	

Q. Is device type (e.g., Apple, Samsung, Google, etc.) alone enough to give you confirmation that a product will work with your device, or do you also need to see a list of device models (e.g., iPhone 8, Galaxy S8, Pixel 2, etc.)?

Q. Is connector type (e.g., lightning, micro-USB, USB-C, etc.) alone enough to give you confirmation that a product will work with your device, or do you also need to see a list of device models (e.g., iPhone 8, Galaxy S8, Pixel 2, etc.)?

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Importance of Package Elements – Lower Importance

Slightly more than half of global consumers find brand reputation and data to support product features to be important packaging elements. Brand reputation is particularly important to US and Australian consumers.

Base: Total Respondents
Extremely/Very Important

	Total (n=2,800)	 USA (n=400)	 UK (n=400)	 France (n=400)	 Germany (n=400)	 Australia (n=400)	 Japan (n=400)	 Korea (n=400)
Is made by a reputable brand	 55%	69%	60%	31%	42%	66%	57%	61%
Has data to support product features	 52%	58%	45%	49%	45%	48%	60%	59%
I am able to pick up/interact with the box	 50%	65%	55%	38%	37%	58%	34%	63%
Has an extra panel I can open containing more detailed information/images	 47%	52%	45%	49%	41%	42%	45%	60%
Has an opening so I can touch the physical product	 43%	48%	42%	41%	39%	38%	43%	54%
Has an appealing packaging design	 40%	41%	37%	41%	33%	34%	39%	54%
Is packaged in high quality materials	 40%	50%	41%	51%	28%	32%	27%	48%
Is recommended by the store associate	 34%	42%	36%	43%	33%	32%	26%	29%
Has award/endorsement badges	 33%	38%	31%	26%	37%	24%	32%	40%
Shows product specifications in multiple languages	 29%	37%	33%	36%	28%	22%	19%	28%
Has a QR code to find out more information about the product	 28%	34%	28%	30%	23%	21%	24%	35%

Q. When looking at a smartphone accessory package at a physical store, how important or unimportant are each of the following to you?




















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Least Important Package Elements

Among those package elements consumers find less important, having product specifications in multiple languages and having a QR code are the least useful elements. Consumers in the US, UK, and Australia find these elements less important than other global consumers.

Base: Rated 2+ Elements Not Very/Not at All Important

		 USA (n=227)	 UK (n=233)	 France (n=221)	 Germany (n=306)	 Australia (n=257)	 Japan (n=251)	 Korea (n=191)
Shows product specifications in multiple languages	 17%	35%	29%	10%	7%	30%	6%	7%
Has a QR code to find out more information about the product	 17%	19%	27%	12%	8%	27%	14%	18%
Has an appealing packaging design	 7%	9%	7%	5%	7%	8%	8%	8%
Is recommended by the store associate	 7%	7%	8%	6%	8%	2%	8%	8%
Is packaged in high quality materials	 7%	7%	7%	6%	5%	9%	8%	5%
Has award/endorsement badges	 6%	6%	6%	6%	6%	5%	8%	6%
Has an opening so I can touch the physical product	 6%	2%	4%	8%	7%	5%	6%	8%
Has an extra panel I can open containing more detailed information/images	 4%	0%	0%	6%	9%	1%	5%	5%
I am able to pick up/interact with the box	 4%	2%	2%	5%	5%	1%	7%	5%
Is made by a reputable brand	 3%	3%	2%	6%	4%	3%	2%	4%
Has data to support product features	 3%	2%	1%	4%	6%	2%	3%	1%
Has a photo of the actual product	 3%	2%	2%	3%	3%	1%	4%	5%

Note: Only elements with a global percentage of 2% or more are shown.

*Q. You said the following are important to you when looking at a smartphone accessory package in a physical store. Which is the **least important** to you?*

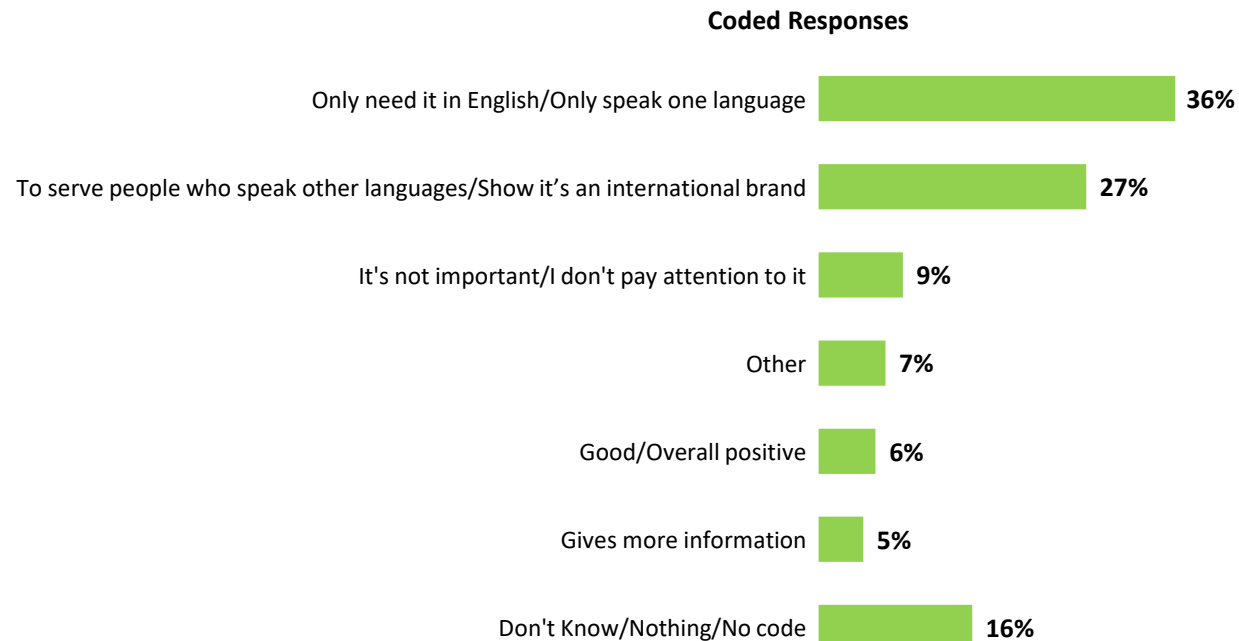
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Sentiment Around Multiple Languages on Package – Open Ended Reasons

Consumers are split on whether or not product specifications should be shown in multiple languages on a smartphone accessory package. While about one third think they should only be shown in the country's native language, about 3 in 10 think having multiple languages is inclusive of non-native speakers and showcases a brand's international status.

Base: Total US Respondents (n=400)



Q. You said it is important/unimportant that product specifications are shown in multiple languages on a package. Why?










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QR Code Scanning Behavior

Almost 6 in 10 global consumers who find QR codes to be important report having ever scanned one. While this number is greater in the US and Korea, with two-thirds of consumers report having scanned a QR code, it is highest in Japan with nearly 8 in 10 consumers having ever scanned a code.

Base: Rated QR Codes Extremely/Very Important

		 USA (n=135)	 UK (n=110)	 France (n=119)	 Germany (n=91)	 Australia (n=85)	 Japan (n=96)	 Korea (n=140)
Yes	 57%	67%	42%	36%	60%	47%	77%	69%
No	 43%	33%	58%	64%	40%	53%	23%	31%

Q. You said having a QR code to find out more information about the product is important to you. Have you ever scanned a QR code on a smartphone accessory package?

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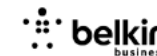


Mobile Power Category Deep Dive



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Package Element Placement Preferences – Wireless Charging Pads

When it comes to wireless charging pad packages, global consumers want to be able to see the product on the front of the package, preferring a plastic window over a photo or a physical opening. They prefer that detailed product descriptions and explanations of how it works be placed on the back of the package.

Base: Total Respondents (n=1,128)

	Front of Package	Back of Package	Side of Package	Inside an Extra Panel
A plastic window that shows the product	72%	13%	9%	6%
A photo of the actual product	65%	21%	8%	7%
An opening so I can touch the physical product	58%	14%	17%	11%
Information on device compatibility	46%	32%	16%	7%
Icons that illustrate key product features	44%	27%	18%	10%
Information on connector types	44%	32%	17%	7%
Information/data on how fast the product will charge my device	43%	30%	17%	10%
Detailed product images/illustrations	32%	39%	10%	19%
Lifestyle imagery to display a use case	29%	37%	16%	19%
Photos/illustrations to show me how the product works	28%	43%	11%	18%
A QR code to find out more information	20%	41%	28%	11%
A warranty claim	19%	41%	14%	26%
Comparison charts on speed of charging	18%	45%	24%	14%
Text descriptions to tell me how the product works	16%	50%	13%	20%
Detailed product descriptions	15%	53%	10%	22%
Detailed warranty information	14%	40%	13%	32%

Q. Thinking about wireless charging pad packages, please rank how important each of the following pieces of information is to you.











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Wireless Charging Speed Communication Preferences

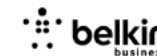
Globally, 6 in 10 consumers prefer to see charging speed stated in hours/minutes on a wireless charging pad package. This preference is stronger among German consumers.

Base: Total Respondents

								
	Total (n=2,800)	USA (n=400)	UK (n=400)	France (n=400)	Germany (n=400)	Australia (n=400)	Japan (n=400)	Korea (n=400)
Using hours/minutes (e.g., "+30 hours")	 60%	53%	58%	63%	72%	59%	59%	58%
Using percentages (e.g., "30% faster")	 26%	26%	23%	26%	21%	25%	26%	34%
Using multiples (e.g., "5X longer")	 13%	21%	18%	10%	6%	14%	15%	8%

Q. Thinking about wireless charging pad packages, how do you prefer to see charging speed communicated?

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Package Element Placement Preferences – Power Banks

When it comes to power bank packages, global consumers want to be able to see the product on the front of the package, preferring a plastic window over a photo or a physical opening. They prefer that detailed product descriptions and explanations of how it works be placed on the back of the package.

Base: Total Respondents (n=1,110)

	Front of Package	Back of Package	Side of Package	Inside an Extra Panel
A plastic window that shows the product	73%	12%	8%	7%
A photo of the actual product	65%	20%	8%	7%
An opening so I can touch the physical product	59%	13%	19%	9%
Information on device compatibility	46%	32%	14%	8%
Information/data on how fast the product will charge my device	43%	29%	18%	11%
Icons that illustrate key product features	40%	33%	18%	9%
Information on connector types	40%	33%	20%	7%
Detailed product images/illustrations	34%	37%	10%	20%
Lifestyle imagery to display a use case	30%	33%	15%	23%
Photos/illustrations to show me how the product works	26%	41%	11%	23%
Comparison charts on speed of charging	20%	42%	20%	18%
A QR code to find out more information	20%	41%	27%	12%
A warranty claim	19%	38%	13%	29%
Text descriptions to tell me how the product works	17%	49%	13%	20%
Detailed product descriptions	17%	53%	10%	21%
Detailed warranty information	13%	41%	14%	33%

Q. Thinking about power bank/portable power packages, please rank how important each of the following pieces of information is to you.












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Power Bank Data Preferences

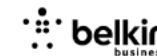
Globally, consumers find speed of charging information, both for their device and the power bank itself, to be more important than information on the number of hours it will add or number of time it will charge their device.

**Base: Total Respondents
Ranked 1 or 2**

								
	Total (n=2,800)	USA (n=400)	UK (n=400)	France (n=400)	Germany (n=400)	Australia (n=400)	Japan (n=400)	Korea (n=400)
Shows me how quickly it will charge my device (e.g., "40% faster")	 58%	60%	53%	53%	61%	59%	63%	60%
Shows me how long it will take to fully recharge after using it to charge my device	 53%	52%	50%	56%	38%	59%	46%	70%
Shows me how many hours it will add to my device (e.g., "+30 hours")	 49%	53%	54%	52%	54%	48%	45%	37%
Shows me the number of times it will fully charge my device (e.g., "up to three times")	 39%	35%	41%	38%	45%	34%	45%	33%

Q. Thinking about power bank/portable power packages, please rank how important each of the following pieces of information is to you.

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Package Element Placement Preferences – Car Chargers

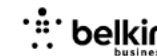
When it comes to car charger packages, global consumers want to be able to see the product on the front of the package, preferring a plastic window over a photo or a physical opening. They prefer that detailed product descriptions and explanations of how it works be placed on the back of the package.

Base: Total Respondents (n=1,120)

	Front of Package	Back of Package	Side of Package	Inside an Extra Panel
A plastic window that shows the product	75%	12%	7%	6%
A photo of the actual product	65%	20%	7%	7%
An opening so I can touch the physical product	57%	15%	19%	9%
Information on device compatibility	45%	33%	14%	8%
Icons that illustrate key product features	43%	28%	19%	10%
Information on connector types	43%	32%	18%	7%
Information/data on how fast the product will charge my device	39%	33%	17%	11%
Detailed product images/illustrations	32%	39%	11%	18%
Photos/illustrations to show me how the product works	28%	41%	11%	19%
Lifestyle imagery to display a use case	26%	37%	15%	21%
Comparison charts on speed of charging	20%	42%	21%	17%
A QR code to find out more information	18%	42%	28%	12%
Detailed product descriptions	16%	53%	11%	21%
Text descriptions to tell me how the product works	16%	52%	13%	20%
A warranty claim	16%	42%	14%	28%
Detailed warranty information	13%	41%	13%	33%

Q. Thinking about car charger packages, please rank how important each of the following pieces of information is to you.

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Package Element Placement Preferences – Wall Chargers

When it comes to wall charger packages, global consumers want to be able to see the product on the front of the package, preferring a plastic window over a photo or a physical opening. They prefer that detailed product descriptions and explanations of how it works be placed on the back of the package.

Base: Total Respondents (n=1,121)

	Front of Package	Back of Package	Side of Package	Inside an Extra Panel
A plastic window that shows the product	74%	12%	8%	5%
A photo of the actual product	68%	19%	7%	7%
An opening so I can touch the physical product	56%	16%	18%	10%
Information on device compatibility	46%	32%	14%	7%
Information on connector types	43%	30%	19%	8%
Information/data on how fast the product will charge my device	41%	29%	18%	11%
Icons that illustrate key product features	41%	32%	17%	9%
Detailed product images/illustrations	31%	40%	11%	19%
Lifestyle imagery to display a use case	26%	38%	14%	22%
Photos/illustrations to show me how the product works	23%	44%	12%	21%
A warranty claim	20%	38%	14%	29%
Comparison charts on speed of charging	19%	43%	21%	17%
A QR code to find out more information	18%	43%	27%	12%
Text descriptions to tell me how the product works	17%	52%	12%	19%
Detailed product descriptions	16%	55%	9%	20%
Detailed warranty information	11%	40%	13%	37%

Q. Thinking about wall charger packages, please rank how important each of the following pieces of information is to you.

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Package Element Placement Preferences – Charging Cables

When it comes to charging cable packages, global consumers want to be able to see the product on the front of the package, preferring a plastic window over a photo or a physical opening. They prefer that detailed product descriptions and explanations of how it works be placed on the back of the package.

Base: Total Respondents (n=1,121)

	Front of Package	Back of Package	Side of Package	Inside an Extra Panel
A plastic window that shows the product	76%	11%	7%	6%
A photo of the actual product	67%	18%	7%	8%
An opening so I can touch the physical product	60%	13%	18%	9%
Information on device compatibility	46%	33%	13%	8%
Icons that illustrate key product features	44%	28%	17%	10%
Information/data on how fast the product will charge my device	44%	31%	15%	11%
Information on connector types	42%	32%	17%	9%
Detailed product images/illustrations	35%	39%	10%	17%
Photos/illustrations to show me how the product works	30%	40%	12%	18%
Lifestyle imagery to display a use case	26%	36%	16%	21%
A QR code to find out more information	21%	41%	28%	10%
A warranty claim	19%	39%	13%	28%
Comparison charts on speed of charging	19%	43%	23%	16%
Text descriptions to tell me how the product works	18%	51%	13%	19%
Detailed product descriptions	17%	55%	10%	18%
Detailed warranty information	12%	40%	14%	34%

Q. Thinking about charging cable packages, please rank how important each of the following pieces of information is to you.

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Shopping Behaviors & Preferences
















Pre-Shop Research Habits

Globally, 8 in 10 consumers do research before going into a store to purchase smartphone accessories.

Base: Total Respondents

		 USA (n=400)	 UK (n=400)	 France (n=400)	 Germany (n=400)	 Australia (n=400)	 Japan (n=400)	 Korea (n=400)
	Total (n=2,800)							
Does Research (Net)*	 84%	84%	83%	82%	86%	75%	84%	92%
I do a lot of research	 31%	36%	23%	24%	42%	24%	26%	42%
I do a little research	 53%	49%	60%	58%	44%	51%	57%	50%
I don't do any research	 16%	16%	18%	18%	14%	25%	17%	9%

**Net: Aggregate of "I do a lot of research" and "I do a little research"*
















Q. How much research do you typically do before going to a physical store to purchase smartphone accessories?

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Types of Research Done

Global consumers primarily look up/compare products online and search for information via a search engine when researching smartphone accessories. While Korean consumers tend to compare products online more than other consumers, US consumers tend to rely more on reviews and German consumers more often talk to friends and family members.

		 USA (n=337)	 UK (n=330)	 France (n=328)	 Germany (n=344)	 Australia (n=301)	 Japan (n=334)	 Korea (n=366)
Look up/compare products online	 62%	55%	58%	55%	67%	55%	68%	74%
Search for products/information via a search engine	 55%	53%	49%	52%	56%	58%	59%	57%
Read online consumer reviews	 44%	56%	49%	34%	42%	27%	48%	48%
Talk to friends/family members	 42%	42%	39%	34%	52%	46%	32%	50%
Visit the brand's website for product details	 39%	46%	44%	34%	37%	42%	40%	31%
Read online consumer reviews on the manufacturer's website	 27%	38%	29%	18%	24%	32%	18%	28%
Read articles on tech websites/blogs	 17%	23%	15%	13%	18%	19%	18%	13%
Reach technology magazines or newspaper articles	 13%	16%	14%	11%	15%	10%	13%	11%

Q. What type(s) of research do you do before going to a store to purchase smartphone accessories?

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Pre-Shop Decision-Making Process

Globally, 6 in 10 consumers spend time browsing the shelf when shopping for a smartphone accessory. This tendency is even stronger among Japanese consumers, while fewer German consumers spend time browsing.

Base: Total Respondents

	Total (n=2,800)	USA (n=400)	UK (n=400)	France (n=400)	Germany (n=400)	Australia (n=400)	Japan (n=400)	Korea (n=400)
Spends time browsing the shelf in a physical store (Net)	60%	52%	53%	62%	54%	57%	77%	64%
I go in the store with an idea of what I want and confirm/change my decision based on the selection on shelf	43%	35%	36%	43%	45%	38%	57%	48%
I go in the store with an idea of what I want and confirm my decision by asking the store associate for a recommendation	22%	25%	24%	26%	16%	24%	12%	27%
I go in without an idea of what I want and decide after browsing the selection on the shelf	17%	17%	17%	19%	9%	19%	20%	16%
I do research before going into the store and know what I want to purchase, so I don't spend time browsing	13%	18%	17%	5%	25%	16%	11%	4%
I go in the store without an idea of what I want and rely entirely on store associates' recommendations	5%	6%	5%	6%	5%	4%	2%	5%

*Net: Aggregate of "I go into the store with an idea of what I want and confirm/change based on the selection on the shelf" and "I go in with an idea of what I want and decide after browsing the selection on the shelf"

Q. When planning to go to a physical store to buy a smartphone accessory, which of the following best describes you?












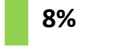
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Browsing Behavior

4 in 10 global consumers always looks at a smartphone accessory package before making a purchase, while an equal number only interact with packages if they are comparing two similar products or a package is particularly eye-catching.

Base: Browses Shelf Before Purchasing

								
	Total (n=1,672)	USA (n=208)	UK (n=211)	France (n=249)	Germany (n=216)	Australia (n=227)	Japan (n=305)	Korea (n=256)
I always look at the sides/back of the package before purchasing, even if I have done research beforehand	 40%	46%	42%	24%	43%	48%	43%	34%
I only pick up packages to look at the sides/back if there are two similar products I want to compare	 20%	19%	12%	27%	20%	15%	21%	23%
I pick up packages that catch my eye to look at the sides/back	 19%	18%	24%	18%	16%	18%	20%	21%
I don't spend much time looking, I just pick a style I like and purchase it	 13%	9%	14%	18%	8%	15%	13%	13%
I don't spend much time looking, I just pick one made by a brand I know/trust and purchase it	 8%	7%	7%	13%	11%	6%	3%	9%

Q. You said you decide based on the selection on the shelf when deciding what smartphone accessory to purchase. Which of the following best describes how you make your decision?

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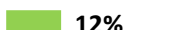
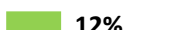
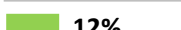
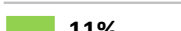

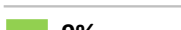


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Package Comparison Points

When comparing two or more similar smartphone accessories in store, consumers primarily use clearly listed technical specifications, brand, and price to decide which to purchase.

Base: Total Respondents

								
	Total (n=2,800)	USA (n=400)	UK (n=400)	France (n=400)	Germany (n=400)	Australia (n=400)	Japan (n=400)	Korea (n=400)
The one that most clearly states the product's technical specifications	 38%	36%	34%	36%	40%	41%	39%	42%
The brand I know/trust	 34%	36%	40%	31%	35%	35%	28%	32%
Whichever is cheaper/on sale	 34%	30%	34%	29%	33%	40%	35%	35%
Whichever has better online reviews	 24%	24%	23%	16%	22%	15%	29%	37%
The one that most clearly describes how to use the product through text	 19%	15%	19%	26%	20%	14%	22%	16%
Whatever the store associate recommends	 12%	9%	11%	18%	12%	9%	13%	15%
Whichever package has the most appealing aesthetics	 12%	12%	11%	9%	9%	10%	15%	20%
The one that most clearly shows how to use the product through photos	 12%	13%	11%	10%	12%	11%	13%	14%
The one that most clearly shows how to use the product through drawings	 11%	12%	10%	13%	11%	8%	10%	13%
The product that comes in a more premium-looking package	 10%	8%	10%	12%	7%	6%	9%	17%
The one that has award/endorsement badges on the package	 9%	10%	10%	7%	11%	6%	11%	10%
The one in the smaller package	 4%	6%	4%	4%	5%	1%	3%	3%
I buy the one in the larger package	 3%	6%	4%	3%	3%	3%	2%	5%

Q. When comparing two or more similar smartphone accessories products in store, which of the following factors do you use to choose which you will purchase?

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Most Influential Comparison Point

Clear technical specifications, followed closely by price and brand, is the most influential factor consumers use to decide between two similar products in store.

Base: Total Respondents

								
	Total (n=2,800)	USA (n=400)	UK (n=400)	France (n=400)	Germany (n=400)	Australia (n=400)	Japan (n=400)	Korea (n=400)
The one that most clearly states the product's technical specifications	 24%	25%	18%	24%	25%	27%	23%	27%
Whichever is cheaper/on sale	 20%	16%	19%	17%	22%	28%	21%	19%
The brand I know/trust	 17%	19%	25%	17%	18%	18%	11%	12%
Whichever has better online reviews	 11%	13%	9%	6%	10%	8%	16%	14%
I buy whatever the store associate recommends	 6%	3%	6%	9%	3%	5%	7%	6%
The one that most clearly describes how to use the product through text	 6%	5%	6%	8%	7%	4%	6%	4%
Whichever package has the most appealing aesthetics	 4%	3%	5%	3%	2%	3%	6%	6%
The one that most clearly shows how to use the product through photos	 3%	4%	3%	4%	3%	3%	2%	3%
The product that comes in a more premium-looking package	 3%	4%	2%	5%	2%	1%	2%	5%
The one that most clearly shows how to use the product through drawings	 3%	2%	3%	4%	3%	2%	2%	3%
The one that has award/endorsement badges on the package	 2%	2%	2%	3%	2%	1%	4%	1%
The one in the smaller package	 1%	2%	1%	2%	2%	0%	1%	1%
The one in the larger package	 1%	2%	1%	1%	1%	0%	0%	1%

Q. Which factor is most influential when deciding between two or more similar smartphone accessories products to purchase?












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Technical Specification Preferences

Among those who use technical specifications to decide between two similar products, nearly two-thirds of consumers prefer that these specifications are displayed as simple icons with a little bit of text.

Base: Buys Product with Clearest Technical Specifications

								
	Total (n=674)	USA (n=101)	UK (n=70)	France (n=97)	Germany (n=100)	Australia (n=107)	Japan (n=92)	Korea (n=107)
Simple images/icons with a little bit of text	 65%	55%	63%	70%	72%	67%	62%	65%
Simple images/icons with a lot of text	 33%	47%	34%	25%	24%	34%	38%	32%
No images/icons, just text	 5%	4%	6%	7%	8%	3%	5%	5%
Simple images/icons with no text	 4%	7%	4%	2%	4%	5%	4%	3%

Q. You said you buy the product that most clearly states the product's technical specifications (e.g. compatibility, charging speed, etc.). How do you prefer that these specifications are shown?

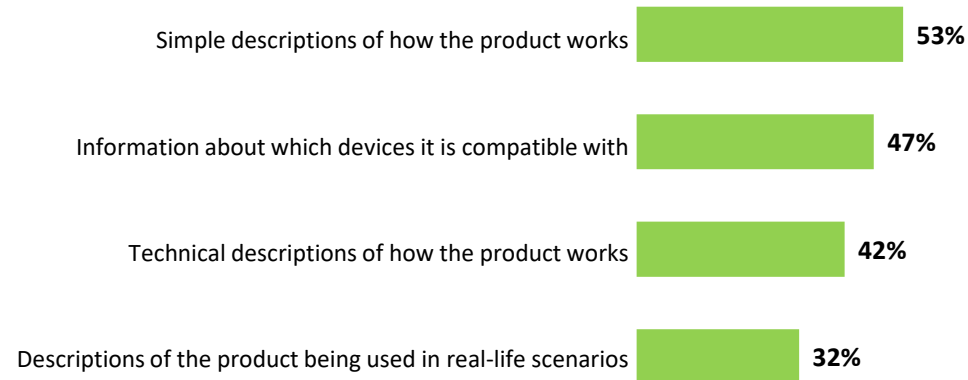
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Product Description Preferences

Among those who use product descriptions to decide between two similar products, consumers find simple text descriptions of how the product works and information about device compatibility to be the most important pieces of information.

Base: Buys Product with Best Descriptions (n=154)



Note: Insufficient base to read out by country.

Q. You said you buy the product that most clearly describes how to use the product. What types of descriptions best help you understand how to use the product?

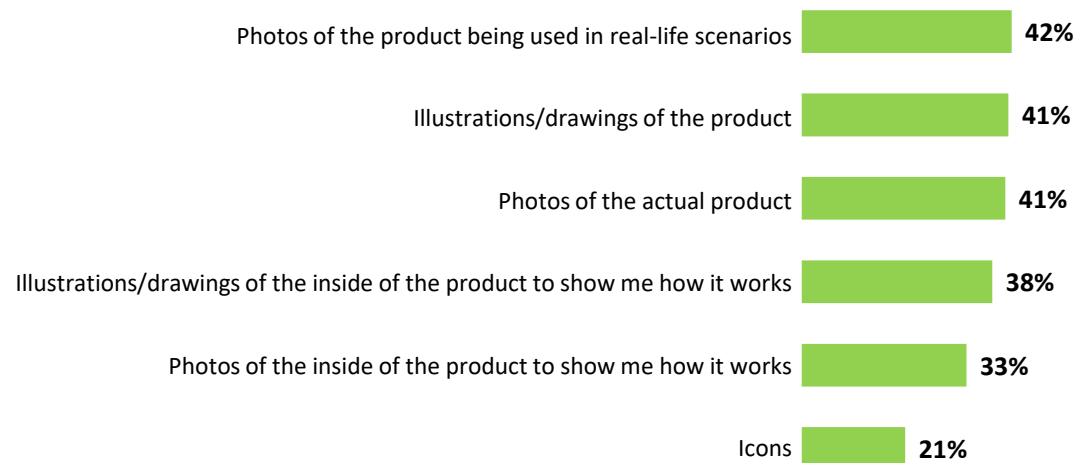
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Product Image Preferences

Among those who use product images to decide between two similar products, consumers find lifestyle imagery, illustrations, and product photos to be equally useful, followed closely by illustrations of the inside of the product.

Base: Buys Product with Best Images (n=155)



Note: Insufficient base to read out by country.

Q. You said you buy the product that most clearly illustrates how to use the product. What types of illustrations/images best help you understand how to use the product?

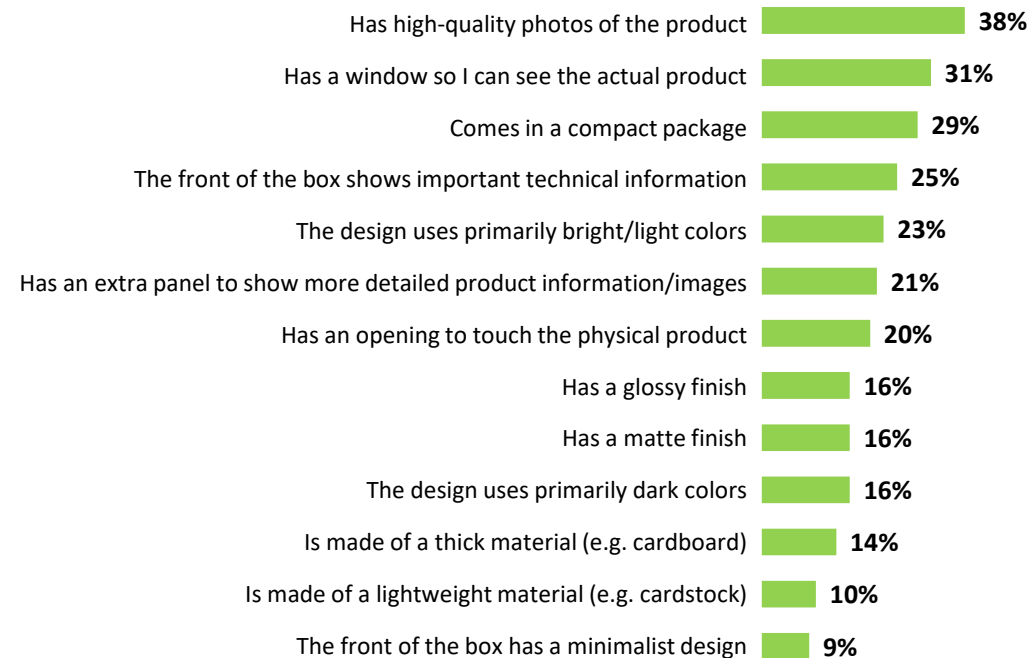
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Perceptions of Premium Packaging

Globally, high-quality product photos, a window that shows the actual product, and compact packages indicate to consumers that a package is premium.

Base: Buys Most Premium-Looking Product (n=80)



Note: Insufficient base to read out by country.

Q. You said you buy the product that comes in a more premium-looking package. In your opinion, what makes a package look/feel premium?








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Perceptions of Premium Packaging – Within Brand

When comparing two or more similar products made by the same brand, global consumers perceive that more premium products have a window that shows the actual product, an extra panel with more detailed information/images, and high-quality product photos.

Base: Total Respondents

								
	Total (n=2,800)	USA (n=400)	UK (n=400)	France (n=400)	Germany (n=400)	Australia (n=400)	Japan (n=400)	Korea (n=400)
Has a window so I can see the actual product	41%	43%	40%	42%	46%	49%	37%	30%
Has an extra panel to show more detailed product information/images	28%	29%	25%	20%	30%	29%	32%	30%
Has high-quality photos of the product	27%	32%	29%	27%	27%	25%	24%	24%
Has a compact size/design	21%	16%	24%	14%	19%	17%	24%	34%
Has an opening to touch the physical product	19%	19%	20%	14%	21%	17%	20%	21%
Has a higher price	16%	17%	22%	6%	22%	18%	17%	8%
Has a special name (e.g., “Power Cord” vs. “Power Cord Plus”)	12%	12%	12%	17%	12%	11%	11%	7%
Has a glossy finish	11%	12%	17%	6%	9%	9%	11%	14%
Has a matte finish	11%	11%	13%	7%	10%	10%	10%	13%
The design uses primarily bright/light colors	10%	12%	11%	6%	11%	5%	10%	16%
The front of the box has a minimalist design	9%	8%	10%	6%	10%	8%	7%	18%
Is made of a lightweight material (e.g. cardstock)	9%	8%	9%	7%	8%	9%	12%	14%
Is made of a thick material (e.g. cardboard)	9%	13%	9%	8%	10%	8%	3%	11%
The design uses primarily dark colors	7%	10%	9%	5%	7%	6%	7%	9%

Q. When comparing two or more similar smartphone accessories made by the same brand in store, what about the package helps you to determine which is more premium?

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Brand Awareness & Perceptions

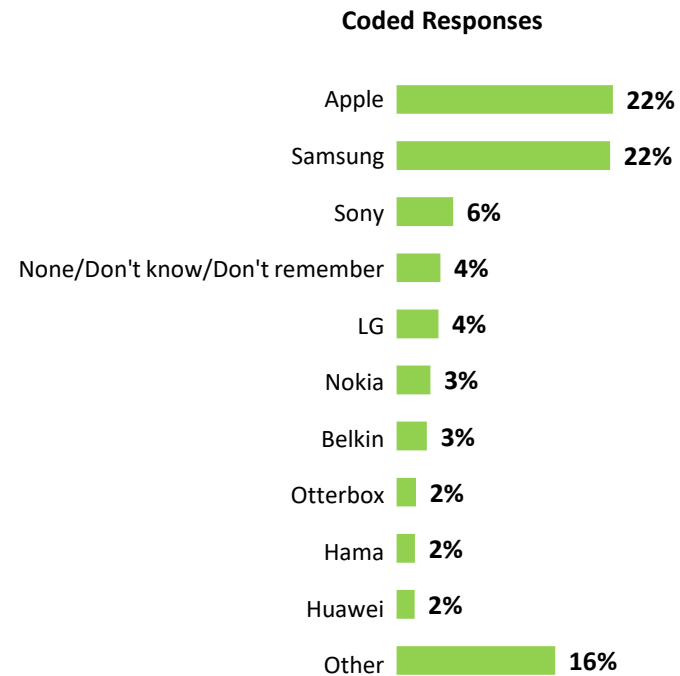




Unaided Brand Awareness

Globally, Apple and Samsung are the most top-of-mind smartphone accessory brands. Belkin's unaided awareness is low at 3%, on par with Nokia.

Base: Total Respondents (n=2,800)



Q. Thinking about brands of smartphone accessories, what brands come to mind?




















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Aided Brand Awareness

Globally, Apple, Samsung, Sony, and Google dominate brand awareness in the smartphone accessories space. Belkin leads Amazon Basics, with over half of global consumers aware of the brand. Awareness of Belkin is much higher in the US, UK, and Australia than in other countries, and is particularly low in Japan.

Base: Total Respondents

								
	Total (n=2,800)	USA (n=400)	UK (n=400)	France (n=400)	Germany (n=400)	Australia (n=400)	Japan (n=400)	Korea (n=400)
Apple	 96%	99%	97%	93%	92%	99%	97%	98%
Samsung	 95%	98%	97%	96%	95%	98%	81%	97%
Sony	 94%	96%	97%	89%	92%	93%	96%	95%
Google	 91%	96%	95%	78%	89%	92%	92%	93%
Belkin	 56%	79%	70%	47%	42%	75%	25%	54%
Amazon Basics	 51%	68%	56%	40%	45%	31%	52%	63%
Softbank	 44%	38%	33%	25%	30%	21%	95%	64%
Xiaomi	 35%	34%	36%	32%	27%	23%	24%	73%
Anker	 33%	43%	39%	22%	27%	20%	40%	42%
iHome	 31%	69%	28%	24%	23%	16%	23%	38%
Juice	 30%	44%	45%	18%	20%	25%	22%	38%
Nomad	 30%	36%	27%	42%	17%	19%	24%	43%

Note: See appendix for remaining brands.

Q. Please tell us your familiarity with each of the following brands of smartphone accessories.













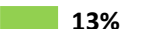
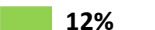

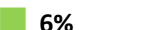
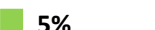

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Fast-Charging Technology Awareness

Globally, the most well-known fast-charging technologies are Samsung Adaptive Fast Charge and Apple Fast Charging, likely due to the inclusion of the brand name.

Base: Buys Product with Best Descriptions

								
	Total (n=2,340)	USA (n=337)	UK (n=330)	France (n=328)	Germany (n=344)	Australia (n=301)	Japan (n=334)	Korea (n=366)
Samsung Adaptive Fast Charge	 34%	39%	30%	33%	36%	27%	13%	63%
Apple Fast Charging	 32%	34%	37%	23%	30%	30%	29%	42%
Fast Charging	 22%	39%	34%	9%	16%	32%	7%	15%
Quick Charge	 21%	27%	25%	18%	15%	16%	23%	21%
Huawei SuperCharge	 15%	11%	16%	13%	22%	9%	13%	23%
Motorola TurboPower	 13%	17%	12%	7%	14%	8%	8%	25%
Power Delivery	 12%	14%	13%	11%	12%	7%	10%	13%
Qi	 9%	9%	12%	7%	8%	6%	17%	7%
Mophie Charge Force	 6%	14%	7%	3%	3%	2%	5%	7%
One Plus Dash Charge	 5%	7%	8%	4%	5%	2%	3%	7%
None of these	 36%	24%	32%	45%	41%	41%	50%	21%

Q. Before today, which of the following have you heard of?

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Brand Block Evaluation – Top 10 Attributes

Global consumers feel that Belkin's smartphone accessories brand block looks useful, basic, and ordinary.

Base: Total Respondents



								
	Total (n=2,800)	USA (n=400)	UK (n=400)	France (n=400)	Germany (n=400)	Australia (n=400)	Japan (n=400)	Korea (n=400)
Useful	37%	38%	40%	38%	43%	39%	27%	32%
Basic	32%	31%	27%	31%	29%	26%	34%	46%
Ordinary	30%	23%	22%	27%	39%	18%	42%	40%
Good value	24%	30%	29%	34%	30%	27%	7%	13%
Reliable	24%	26%	28%	23%	25%	32%	14%	21%
High quality	22%	30%	27%	16%	22%	25%	19%	14%
Trendy	15%	18%	15%	22%	21%	15%	10%	9%
Cool	15%	22%	17%	17%	12%	15%	14%	9%
Premium	14%	21%	19%	11%	12%	17%	9%	13%
Innovative	13%	22%	17%	11%	15%	15%	7%	7%

Note: See appendix for remaining attribute ratings.

Q. Looking at the family of products shown in the image below, which words would you use to describe the image?

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Demographics





Audience Demographics

	Total (n=2,340)	USA (n=337)	UK (n=330)	France (n=328)	Germany (n=344)	Australia (n=301)	Japan (n=334)	Korea (n=366)
Age								
18-24	9%	10%	11%	8%	19%	8%	6%	4%
25-34	27%	40%	26%	24%	21%	27%	28%	20%
35-44	32%	27%	31%	33%	25%	32%	32%	44%
45-54	32%	24%	33%	35%	35%	34%	35%	32%
Avg. Age	38	36	38	39	37	39	39	40
Gender								
Male	49%	50%	48%	50%	49%	45%	52%	51%
Female	51%	50%	52%	50%	51%	56%	49%	50%
Technology Profile								
Innovator	16%	30%	18%	15%	13%	10%	9%	17%
Early adopter	16%	15%	19%	15%	14%	14%	12%	22%
Early majority	49%	42%	47%	50%	49%	54%	60%	45%
Late majority	15%	12%	15%	13%	19%	18%	13%	12%
Laggard	4%	2%	1%	7%	5%	4%	7%	4%
Smartphone Type								
iPhone	35%	37%	43%	24%	29%	46%	49%	21%
Android	63%	63%	55%	74%	69%	53%	51%	79%
Other	1%	0%	3%	3%	3%	1%	0%	0%



Audience Demographics

	Total (n=2,340)	USA (n=337)	UK (n=330)	France (n=328)	Germany (n=344)	Australia (n=301)	Japan (n=334)	Korea (n=366)
Marital Status								
Single	34%	29%	34%	33%	40%	33%	39%	30%
Married	46%	51%	40%	37%	30%	41%	54%	66%
With significant other	13%	10%	19%	23%	20%	17%	1%	2%
Separated	1%	2%	1%	1%	2%	4%	0%	0%
Divorced	6%	8%	5%	5%	8%	5%	6%	2%
Widowed	1%	1%	1%	0%	1%	1%	1%	1%
Household Size								
1	17%	13%	15%	22%	28%	14%	15%	15%
2	24%	26%	26%	24%	29%	27%	20%	16%
3	26%	25%	24%	22%	21%	24%	30%	34%
4	23%	23%	25%	24%	16%	21%	23%	27%
5 or more	10%	13%	9%	9%	6%	14%	12%	9%
Parent or Guardian of Minor								
Yes	55%	61%	58%	65%	38%	55%	47%	61%
No	44%	39%	42%	33%	61%	44%	52%	39%

* Ethnicity only asked in United States.



Audience Demographics

	Total (n=2,340)	USA (n=337)	UK (n=330)	France (n=328)	Germany (n=344)	Australia (n=301)	Japan (n=334)	Korea (n=366)
Education								
Some high school	7%	2%	6%	6%	23%	10%	2%	0%
High school graduate	23%	22%	19%	26%	23%	24%	36%	10%
Some college	13%	20%	25%	15%	3%	20%	5%	3%
Associate's degree	10%	9%	6%	3%	29%	8%	6%	7%
Bachelor's degree	31%	29%	28%	21%	9%	28%	38%	66%
Master's degree	11%	13%	10%	18%	10%	9%	8%	11%
Doctoral degree	2%	1%	2%	3%	2%	1%	1%	2%
Professional degree	3%	5%	5%	7%	1%	1%	4%	2%
Employment Status								
Employed full-time	57%	54%	55%	70%	49%	46%	58%	69%
Employed part-time	13%	14%	16%	7%	19%	19%	13%	6%
Self-employed	7%	7%	7%	4%	5%	7%	10%	10%
Unemployed	6%	9%	8%	9%	8%	6%	3%	4%
Stay-at-home parent	9%	11%	9%	5%	3%	12%	13%	8%
Student	6%	4%	6%	5%	12%	6%	5%	3%
Retired	2%	2%	1%	0%	5%	4%	0%	0%



Audience Demographics

	USA (n=400)
Ethnicity	
Less than \$15,000	9%
\$15,000 - \$24,999	11%
\$25,000 - \$34,999	11%
\$35,000 - \$49,999	17%
\$50,000 - \$74,999	17%
\$75,000 - \$99,999	17%
\$100,000 - \$149,999	12%
\$150,000 or more	7%
Household Income	
Caucasian	57%
Latino	2%
African American	1%
Pacific Islander	2%
Native/Alaskan American	0%
Asian American	7%
Mixed ethnicity	4%
Other	28%



Appendix












Aided Brand Awareness, Cont.

Globally, Belkin has higher brand awareness than brands such as Vivitar, Just Wireless, and Blackweb.

Base: Total Respondents

								
	Total (n=2,800)	USA (n=400)	UK (n=400)	France (n=400)	Germany (n=400)	Australia (n=400)	Japan (n=400)	Korea (n=400)
Belkin	<div><div></div></div> 56%	79%	70%	47%	42%	75%	25%	54%
Vivitar	<div><div></div></div> 27%	53%	36%	21%	15%	16%	18%	34%
Just Wireless	<div><div></div></div> 27%	41%	29%	23%	24%	19%	20%	36%
Blackweb	<div><div></div></div> 25%	37%	27%	21%	17%	17%	21%	39%
myCharge	<div><div></div></div> 25%	38%	25%	21%	21%	15%	19%	35%
Mophie	<div><div></div></div> 25%	43%	26%	16%	15%	15%	19%	38%
Aukey	<div><div></div></div> 24%	31%	24%	20%	19%	13%	23%	35%
ZAGG	<div><div></div></div> 23%	40%	24%	15%	17%	12%	19%	35%
Muvit	<div><div></div></div> 22%	29%	22%	25%	15%	13%	19%	34%
Tzumi Electronics	<div><div></div></div> 21%	33%	24%	15%	15%	12%	19%	34%
Native Union	<div><div></div></div> 21%	26%	21%	18%	16%	11%	17%	36%
ESI	<div><div></div></div> 20%	28%	22%	15%	15%	10%	18%	34%

Note: Only elements with a global percentage of 1% or more are shown.

*Q. You said the following are important to you when looking at a smartphone accessory package in a physical store. Which is the **most important** to you?*

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Brand Block Evaluation – Additional Attributes

Belkin's family of smartphone accessory products is not strongly associated with negative attributes such as being outdated or low quality, though there is room for improvement on being seen as unique.

Base: Total Respondents



								
	Total (n=2,800)	USA (n=400)	UK (n=400)	France (n=400)	Germany (n=400)	Australia (n=400)	Japan (n=400)	Korea (n=400)
Unimaginative	 10%	12%	11%	5%	9%	10%	16%	7%
Unique	 8%	18%	11%	3%	6%	8%	5%	7%
Boring	 8%	11%	9%	2%	8%	11%	5%	8%
Fun	 7%	14%	9%	4%	1%	6%	9%	5%
Dated	 6%	4%	5%	1%	3%	4%	22%	4%
Cheap	 6%	7%	8%	3%	4%	5%	7%	7%
Confusing	 5%	5%	7%	3%	4%	6%	5%	7%
Low quality	 3%	5%	5%	2%	2%	4%	2%	2%
Outdated	 2%	2%	3%	2%	2%	3%	1%	5%

Q. Looking at the family of products shown in the image below, which words would you use to describe the image?

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Thank you!

